

(1) Petition for Approval of Fourth Account Current of Trustee for the Period of March 1, 2013 to March 31, 2014, (2) Approval of Attorney's Fees, (3) Petition for Authorization to Pay for Home Modifications and Items in Order to Accommodate the Beneficiary's Special Needs, Declaration of Randolph M. Sharon

Age: 8 years		WELLS FARGO BANK , Trustee, is petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. When the Special Needs Trust was established the Trustee was allowed to purchase a handicapped equipped 2008 GMC Acadia to transport the beneficiary. To avoid liability for the Trust, title to the vehicle was placed in the name of the beneficiary's mother Cindy Gamez with the Trust listed as a lienholder. On 1/16/2014, per Court Order, the Trust was allowed to spend up to \$75,000.00 to purchase a newer handicapped vehicle to transport the beneficiary because the repairs for the 2008 GMC were becoming too costly. Disbursement schedule shows \$72,236.25 was used to purchase a Honda Odyssey. What happened to the 2008 GMC? It appears that the GMC should have either been used as a trade in or sold as it is considered an asset of the trust even though title was held by Cindy Gamez. – Declaration of Petitioner states the 2008 GMC was sold for \$10,000.00 which will be reflected in the next accounting. Please see additional page
		Account period: 3/1/2013 – 3/31/2014	
		Accounting - \$1,174,691.33	
		Beginning POH - \$1,049,189.48	
		Ending POH - \$ 995,369.18 (\$32,771.00 is cash)	
Cont. from 061214		Trustee - \$17,893.10 (1.5% of the value of the trust pursuant to its published fee schedule and allowed by court order dated 5/1/2012)	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	W/ Attorney - \$3,510.00 (7.8 hours @ \$450.00 per hour)	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.	Costs - \$278.00 (for filing fee and court call appearance)	
<input type="checkbox"/>	Pers.Serv.	Petitioner states the beneficiary suffers from severe disabilities. The beneficiary requires a wheelchair and is completely dependent on others for all of his day-to-day activities.	
<input type="checkbox"/>	Conf. Screen	RNS Health Care Consultants has made recommendations concerning the beneficiary's care. RNS Health Care recommends the following:	
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order	1. ADA Bathroom Remodel with roll in shower that will accommodate a shower chair. (Estimate \$8,286.00) 2. Patio Covering. The beneficiary has a history of skin issues. The patio cover will protect the Beneficiary from the extreme heat associated with the area in which he lives. (Estimate \$5,884.00 or \$4,643.00) 3. Play Structure in order to promote individual health, fitness and well-being. (Estimate between \$4,500 - \$7,000 plus delivery and set up charges.)	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
Please see additional page			

Reviewed by: KT
Reviewed on: 8/4/14
Updates:
Recommendation:
File 1A -Gamez

Petitioner prays for an Order:

4. That all acts and transactions of the Trustee appearing in the accounting be confirmed and approved;
5. That the investment set forth be approved and confirmed;
6. That the distributions, payments, and all other acts of the Trustee as set forth in the account be ratified, confirmed and approved;
7. That the compensation of the Trustee during the account be approved;
8. That reasonable compensation in the sum of \$3,510.00 be allowed to the attorney, plus reimbursement of costs in the amount of \$278.00.
9. That the Trustee is authorized to spend up to \$25,000.00 to pay for the costs associated with the bathroom remodel, patio covering and play structure.

NEEDS/PROBLEMS/COMMENTS (cont.):

2. Minute order dated 1/28/10 allowed \$80.00 per month for cell phone charges with anything over that amount being paid by Cindy Gamez (beneficiary's mother). Disbursement schedule shows cell phone charges totaling \$1,194.35 for this account period (12 months) which averages to \$99.53 per month. (\$234.35 more than allowed per the court order.) – *Declaration of Petitioner states the excess was to pay for the cost of a replacement phone for the Beneficiary's mother.*
3. Order dated 1/16/14 allowing for the purchase of a newer vehicle allowed attorney Sharon \$200.00 for reimbursement of costs. Disbursement schedule shows disbursements of \$286.00 for reimbursement of costs. Mr. Sharon should be ordered to return \$86.00 plus interest from 2/3/14 to the trust. – *Declaration of Petitioner states the \$86.00 was for court call.*

Note: If the petition is granted, a status hearing will be set as follows:

- **Wednesday, June 1, 2016** at 9:00 a.m. in Department 303, for the filing of the fifth account.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.

Petition for Authorization to Purchase Residence Which Will be Occupied by the Beneficiary, Petition for Approval of Attorney's Fees, Declaration of Randolph M. Sharon

Age: 8 years		WELLS FARGO BANK, Trustee, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Petitioner is requesting Court authorization to purchase a residence which will be occupied by the beneficiary.	1. Need Order. Local Rule 7.1 states a proposed Order shall be submitted with all pleadings that request relief. If the proposed order is not received in the Probate Filing Clerk's Office ten (10) days before the scheduled hearing, a continuance may be required.
Cont. from 071414			
	Aff.Sub.Wit.	Petitioner states the beneficiary suffers from severe disabilities. The beneficiary requires 24-hour per day care for all of is day-to-day activities. The beneficiary currently resides with his mother.	
✓	Verified		
	Inventory	Petitioner alleges:	
	PTC		
	Not.Cred.	<ul style="list-style-type: none"> The beneficiary's mother provides all of the care and support of the beneficiary. The beneficiary's mother is employed by the trust as the beneficiary's care provider and receives a salary of \$3,000 per month. Other than the residence, furniture, furnishings and personal effects, the mother has no other assets and no source of income. The beneficiary's father does not provide any support. The residence has been owned by the beneficiary's mother since 2007. The beneficiary's mother purchased the residence from her share of the underlying personal injury litigation. Except for delinquent property taxes, there are no other mortgages or liens on the residence. 	
✓	Notice of Hrg		
✓	Aff.Mail	W/	Reviewed by: KT Reviewed on: 8/4/14 Updates: Recommendation: File 1B – Gamez
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order	X	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
Please see additional page.			

Recently, the beneficiary's mother informed the Trustee that the residence is in foreclosure due to the fact that she has not paid the real property taxes. The delinquent taxes total \$15,817.82.

In order to avoid foreclosure and eviction, the Trustee has paid the property taxes. Said amount will be a credit against the purchase price of the residence (if the Court approves the purchase).

Petitioner requests the authority to purchase the residence for the sum of \$220,000.00 (current appraisal attached).

Petitioner requests authority to pay their attorney the sum of \$2,250.00 for services in connection with this petition (5 hours @ \$450 per hour) and \$200.00 in cost for the filing fee.

Petitioner prays for an Order:

1. That the Trustee be authorized to purchase the residence for the sum of \$220,000. Any and all amounts paid by the Trustee for the delinquent property taxes will be a credit against the purchase price.
2. That reasonable compensation in the sum of \$2,250.00 for attorney fees and reimbursement for costs of \$200.00

(1) First and Final Account and Report of Executor, and (2) Petition for Statutory Attorney's Fees, for Costs Reimbursement, and Lien Therefore, and for (3) Distribution

DOD: 1-19-09		
	Aff.Sub.Wit.	
✓	Verified	
✓	Inventory	
✓	PTC	
✓	Not.Cred.	
✓	Notice of Hrg	
✓	Aff.Mail	w
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
✓	Letters	1-22-14
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
✓	9202	
✓	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
✓	FTB Notice	

MARLIN L. HECKMAN, Executor with Full IAEA without bond, is Petitioner. Account period: 1-22-14 through 5-22-14 Accounting: \$100,000.00 Beginning POH: \$100,000.00 Ending POH: \$100,000.00 (Decedent's 25% interest in real property in SLO County) Executor (Statutory): Waives Attorney (Statutory): \$2,000.00 (less than statutory) Costs: \$1,420.00 (for filing fees, publication, certified Letters) Petitioner requests a lien against the real property as security for the payment of fees and costs allowed to the attorney in the total sum of \$3,420.00. Distribution pursuant to Decedent's will: Marlin Heckman: A 1/3 undivided interest in Decedent's 25% interest in certain real property in SLO County, subject to lien for attorney fees and costs Gary Heckman: A 1/3 undivided interest in Decedent's 25% interest in certain real property in SLO County, subject to lien for attorney fees and costs Estate of Melvin Heckman: A 1/3 undivided interest in Decedent's 25% interest in certain real property in SLO County, subject to lien for attorney fees and costs

NEEDS/PROBLEMS/COMMENTS:
1. This estate was originally opened in 2009 by Petitioner's brother Melvin Heckman. I&A filed 10-23-09 reflected a total estate value of \$114,467.39 consisting of various securities, and pursuant to Order for Distribution entered 1-4-10, the estate was closed. The Order of 1-4-10 included distribution of various securities to each of the three heirs, and also included statutory compensation to Melvin Heckman's attorney, Richard Mahoney of Aliso Viejo, CA, of \$4,434.00. (The former Executor waived compensation.) The estate was reopened in 2014 by Petitioner Marlin Heckman because an additional asset was discovered and the former executor is now deceased. <u>At this time, need receipts from the heirs for the prior distribution of securities pursuant to the Order entered 1-4-10.</u>
2. Petitioner requests distribution to the Estate of Melvin Heckman, and states Katherine A. Chera, trustee of his trust, has opened a Probate in Orange County. However, it is unclear if Ms. Chera has been appointed as Executor in the probate there. Need clarification. The Court may require a revised distribution order that specifies distribution to Ms. Chera as Executor of the Estate.
3. Need consent to distribution of the real property interest in undivided interests pursuant to Local Rule 7.12.3.
Reviewed by: skc
Reviewed on: 8-4-14
Updates:
Recommendation:
File 2 – Heckman

(1) First and Final Account and Report of Administration, Petition for Settlement, (2)
Reimbursement to Executor, (3) Allowance of Statutory Attorneys Fees and (4)
Final Distribution

DOD: 03/05/2012		LESLIE ANN SPARKS , Executor, appointed on 04/17/2012 with full IAEA authority, it petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Need itemization of costs advanced totaling \$179.47 for Shepard, Shepard & Janian dated 06/13. 2. Disbursement Schedule C contains the following unusual charges which pursuant to Probate Code § 1064(a)(2) would need an explanation: Charges are all after the date of death and the estate contained no real property <ul style="list-style-type: none"> A.T.&T, phone totaling \$232.64 beginning 05/12 and continuing till 11/12. Dish Network, TV totaling \$279.95 beginning 05/12 and continuing till 09/12. P.G.&E utilities totaling \$762.87 beginning 05/12 and continuing till 10/12. Amber Sparks, house cleaning, yard maintenance totaling \$400.00. Why are the following charges so high for service? <ul style="list-style-type: none"> Appleby & Co. Service, Subpoena/Records Citibank dated 05/30/12 in the amount of \$789.73. PDA, service on Pershing, LLC dated 11/12/12 totaling \$393.73. PDA, service on Citigroup dated 11/13/12 totaling \$254.26. <p align="center"><u>Please see additional page</u></p>
		Accounting period: 03/06/2012 – 06/16/2014	
Cont. from			
	Aff.Sub.Wit.	Accounting - \$340,667.85	
✓	Verified	Beginning - \$223,158.13	
	Inventory	POH - \$326,313.66	
	PTC	Executor - Waives	
	Not.Cred.	Executor Costs - \$17,477.36	
✓	Notice of Hrg	Attorney - \$7,463.16	
✓	Aff.Mail w/	(statutory)	
	Aff.Pub.	Closing - \$55,000.00	
	Sp.Ntc.	(Tax deficiencies and closing expenses)	
	Pers.Serv.	Distribution to:	
	Conf. Screen	Barbara Simpson-Taylor - \$30,000.00	
	Letters 04/18/12	Jiselle Bakker – 100% of United Security Bank Stock	
	Duties/Supp	Leslie Ann Sparks - \$9,576.04, 200 Shares, Lockheed Martin Corp. Com; 168 Shares, Raytheon Co Com New	
	Objections	Mark J. Taylor - \$9,576.03, 200 Shares, Lockheed Martin Corp. Com; 168 Shares, Raytheon Co Com New	
	Video Receipt		
	CI Report		
✓	9202		
✓	Order	Michael F. Taylor - \$9,576.03, 200 Shares, Lockheed Martin Corp. Com; 168 Shares, Raytheon Co Com New	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: LV
			Reviewed on: 08/04/2014
			Updates:
			Recommendation:
			File 3 – Taylor

Note: Consistent with the Court's recent practice Court will set a Status Hearing as follows:

Wednesday, February 4, 2015 at 9:00 a.m. in Dept. 303 for an Informal Accounting of the **\$55,000.00** Closing Reserve.

Pursuant Local Rule 7.5, if the document noted above is filed 10 days prior to the date listed, the hearing will be taken off calendar and no appearance will be required. **Filing of the informal accounting of closing reserve will not generate a new hearing date.**

Dept. 303, 9:00 a.m. Wednesday, August 6, 2014

(1) First and Final Account and Report of Successor Administrator and (2) Petition for Allowance of Ordinary and Extraordinary Commissions and Fees and for (3) Distribution

DOD: 10-11-10		PUBLIC ADMINISTRATOR , Successor Administrator with Full IAEA, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: Continued from 5-21-14, 6-25-14. <u>The following issues remain:</u> 1. This estate was originally opened with a fee waiver by Former Administrator Karla Dean. <u>The following filing fees totaling \$830.00 are due prior to any distribution:</u> - \$395 (initial petition filed 5-17-12) - \$435 (petition for distribution filed 3-25-13 by Karla Dean) 2. Petitioner does not include the filing fee of \$435 for this petition in the request or payment calculation for the heirs of \$5,985.50. If requested, that brings the closing costs to a total of \$7,250.50 (including the \$435 paid for this petition and the \$830 due per #1 above).										
Cont from 052114, 062514		Account period: 6-18-13 through 2-5-14 Accounting: \$65,150.00 Beginning POH: \$65,150.00 Ending POH: \$65,000.00 (residence)											
<input type="checkbox"/>	Aff.Sub.Wit.	Public Administrator (Statutory): \$2,606.00	<table border="1"> <tr><td colspan="2">Reviewed by: skc</td></tr> <tr><td colspan="2">Reviewed on: 8-4-14</td></tr> <tr><td colspan="2">Updates:</td></tr> <tr><td colspan="2">Recommendation:</td></tr> <tr><td colspan="2">File 4 - Johnson</td></tr> </table>	Reviewed by: skc		Reviewed on: 8-4-14		Updates:		Recommendation:		File 4 - Johnson	
Reviewed by: skc													
Reviewed on: 8-4-14													
Updates:													
Recommendation:													
File 4 - Johnson													
<input checked="" type="checkbox"/>	Verified	Final tax preparation: \$500.00											
<input checked="" type="checkbox"/>	Inventory	Public Administrator (Extraordinary): \$248.00 (1 deputy hour @ \$96/hr plus 2 assistant hours @ \$76/hr for preparation and filing of final tax return)											
<input checked="" type="checkbox"/>	PTC	Attorney (Statutory): \$2,606.00											
<input checked="" type="checkbox"/>	Not.Cred.	Costs: \$25.50 (filing, certified Letters)											
<input checked="" type="checkbox"/>	Notice of Hrg	In order to allow the beneficiaries to keep the house, they have agreed to pay the above fees totaling \$5,985.50.											
<input checked="" type="checkbox"/>	Aff.Mail	Distribution pursuant to intestate succession and Assignments of Interest filed by heirs Hanna Johnson and Mary Johnson (See #2):											
<input type="checkbox"/>	Aff.Pub.	Karla Dean: A 25% undivided interest in the real property											
<input type="checkbox"/>	Sp.Ntc.	Roger Dean: A 25% undivided interest in the real property											
<input type="checkbox"/>	Pers.Serv.	Julia Dean: A 25% undivided interest in the real property											
<input type="checkbox"/>	Conf. Screen	Holly Jo Johnson: A 25% undivided interest in the real property											
<input checked="" type="checkbox"/>	Letters												
<input type="checkbox"/>	Duties/Supp												
<input type="checkbox"/>	Objections												
<input type="checkbox"/>	Video Receipt												
<input type="checkbox"/>	CI Report												
<input checked="" type="checkbox"/>	9202												
<input checked="" type="checkbox"/>	Order												
<input type="checkbox"/>	Aff. Posting												
<input type="checkbox"/>	Status Rpt												
<input type="checkbox"/>	UCCJEA												
<input type="checkbox"/>	Citation												
<input checked="" type="checkbox"/>	FTB Notice												

		JENNIFER L. WALTERS, Court appointed attorney for minor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 060414		Petitioner was court-appointed to represent the minor on 8-22-13.	<p><u>Continued from 6-4-14. The following issues remain:</u></p> <ol style="list-style-type: none"> <u>Need Notice of Hearing.</u> Need proof of service of Notice of Hearing at least 15 days prior to the hearing pursuant to Probate Code §1460 on: <ul style="list-style-type: none"> - Kimberly Bush (Guardian) - Devin Singleton (Minor) The Court may also require service of Notice of Hearing with a copy of the petition on the parents, who may be required to pay pursuant to Probate Code §1470(c): <ul style="list-style-type: none"> - LaKeysha Singleton (Mother) - Detrick Singleton (Father) If the parents are determined to be financially unable to pay, the Court may require application for payment at the Court rate pursuant to applicable procedure. Petitioner requests \$122.50 for 0.5 hours spent as follows: "Enter matter into abacus." This appears to be a task secretarial in nature, which is considered by the Court to be a cost of doing business pursuant to Local Rule 7.17.B.4. Petitioner requests \$147.00 for travel to and from court. Travel to and from court is considered to be a cost of doing business and not reimbursable pursuant to Local Rule 7.17.B.4. (Note: This charge is <u>separate</u> from the 1.3 hours charged for attending the hearing.) Petitioner requests \$24.50 in connection with drafting a hearing memo for the Court file on 10.7.13; however, nothing was filed thereafter by Petitioner. (Note: The declaration <u>previously</u> filed on 10-4-13 appears to be covered by a separate line item.)
Aff.Sub.Wit.		Guardianship was granted after Court Trial on 10-7-13.	
✓ Verified		Petitioner requests fees in connection with the representation of the minor for the petition to appoint guardian as follows:	
Inventory		Fees: \$2,958.50 (for 10.3 hours @ \$245/hr) Costs: \$435.00 (filing)	
PTC		Services are itemized by date and include review of documents, conferences with parties and minor, travel to and from court, etc.	
Not.Cred.		Petitioner states she has not received compensation and according to her information and belief, the person she represented has had since the day of her appointment and does now have money or property with which to pay the fees and expenses claimed in this petition.	
Notice of Hrg	X		
Aff.Mail	X		
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
			Reviewed by: skc
			Reviewed on: 8-4-14
			Updates:
			Recommendation:
			File 5A – Singleton

5A

		LAKEYSHA SINGLETON , mother is petitioner.	NEEDS/PROBLEMS/COMMENTS: <u>Continued from 5-21-14. On 5-21-14, the parties participated in mediation re visitation. The mediation agreement was filed 7-23-14 by Petitioner LaKeysha Singleton.</u> <u>If this Petition for Termination goes forward, the following issues remain:</u> 1. Petition is incomplete. Petitioner does not provide a reason why termination of the guardianship is in the best interest of the minor. 2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Termination of Guardianship or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> • Detrick Singleton (Father) • Paternal Grandfather (Not Listed) • Patricia Brown (Paternal Grandfather) • Maternal Grandfather (Not Listed)
		KIMBERLY ANN BUSH , maternal grandmother, was appointed guardian on 10/07/2013. Served by mail on 04/19/2014.	
Cont. from 052114		Father: DETRICK SINGLETON	
	Aff.Sub.Wit.	Paternal grandfather: Not listed	
✓	Verified	Paternal grandmother: Patricia Brown	
	Inventory	Maternal grandfather: Not listed	
	PTC		
	Not.Cred.		
✓	Notice of Hrg	Petitioner does not provide a reason why termination of the guardianship is in the best interest of the minor.	
✓	Aff.Mail	Court Investigator Jennifer Daniel filed a report on 5/14/14.	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: LV / skc
			Reviewed on: 8-4-14
			Updates:
			Recommendation:
			File 5B - Singleton

6 Takako Tsutsui (Det Succ)**Case No. 14CEPR00545****Atty Renge, Lawson K. (for Marvin Tsutsui, Takashi Tsutsui, & Hideo Tsutsui – Petitioners – Brothers)****Petition to Determine Succession to Real Property (Prob. C. 13151)**

DOD: 06/15/2013	MARVIN TSUTSUI, TAKASHI TSUTSUI, and HIDEO TSUTSUI, brothers are petitioners.	NEEDS/PROBLEMS/COMMENTS: 1. Attachment 11 does not provide the decedent's interest in the real property.
	40 days since DOD	
	No other proceedings	
Cont. from	I&A – \$125,000.00	
<input type="checkbox"/> Aff.Sub.Wit.	Decedent died intestate	
<input checked="" type="checkbox"/> Verified	Petitioners request the Court determination that decedent's interest in real property located at 1390 Evergreen Ave. Selma, Ca pass 1/3 rd to Marvin Tsutsui, 1/3 rd Takashi Tsutsui, and 1/3 rd Hideo Tsutsui pursuant to intestate succession.	
<input checked="" type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	w/	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: LV
		Reviewed on: 08/04/2014
		Updates:
		Recommendation:
		File 6 - Tsutsui

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 08/31/2013		EIKO II , spouse is petitioner and requests appointment as Administrator without bond. All heirs waive bond Full IAEA – ? Decedent died intestate Residence: Fowler Publication: The Business Journal <u>Estimated value of the Estate:</u> Real property - \$300,000.00 Probate Referee: Steven Diebert	NEEDS/PROBLEMS/COMMENTS: 1. Petition indicates decedent's residence at the time of death was Fowler, California, therefore the correct publication should be The Fowler Ensign. Petitioner published in The Business Journal. 2. Affidavit of Publication does not include IAEA language therefore the Court cannot grant IAEA authority. 3. Need Notice of Petition to Administer Estate. 4. Need proof of service of the Notice of Petition to Administer Estate pursuant to Probate Code §8110 on: <ul style="list-style-type: none"> • Andrew A. li • Suzanne Sayuri li • Bernard C. li 5. Need Order. 6. Need Letters.
Cont. from			
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail	w/		
<input checked="" type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.		Note: If the petition is granted status hearings will be set as follows: • Wednesday, 01/07/2015 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Wednesday, 09/09/2015 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.	
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen			
<input type="checkbox"/> Letters	x		
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input type="checkbox"/> Order	x		
<input type="checkbox"/> Aff. Posting		Reviewed by: LV Reviewed on: 08/04/2014 Updates: Recommendation: File 7 – li	
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			

DOD: 9-4-13		THELMA ROMERO , Daughter, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Need original will pursuant to Probate Code §8200.
		40 days since DOD	
		No other proceedings	
	Aff.Sub.Wit.	I&A: \$140,000.00 (real property located at 1349 N. Willow in Fresno)	
✓	Verified		
✓	Inventory		
	PTC	Will dated 7-17-12 devises the real property located at 1349 N. Willow in Fresno to Thelma Romero and Arthur Renteria, Sr.	
	Not.Cred.		
N/A	Notice of Hrg	Arthur Renteria, Sr., has disclaimed any and all interest in the property.	
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.	Petitioner therefore requests Court determination that the 100% interest in the real property located at 1349 N. Willow in Fresno passes to her pursuant to Decedent's will and the disclaimer of interest signed by Arthur Renteria, Sr.	
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 8-4-14
			Updates:
			Recommendation:
			File 8 – Hobbs

Status

DOD: 04/17/03	ANNA WINGERT , spouse, was appointed as Executor on 12/13/05.	NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED FROM 07/09/14</u> 1. Need updated status report.
	I & A, Final filed 11/09/06 - \$6,000.00	
	Anna Wingert died on 12/14/06.	
Cont. from 070914		
Aff.Sub.Wit.		
Verified	KEVIN WINGERT , son, was appointed successor executor without bond on 05/21/14. Letters were issued on 05/21/14.	
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	Minute Order from hearing on 05/21/14 set this matter status on 07/09/14.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: JF
Status Rpt		Reviewed on: 08/04/14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 9 – Wingert

Age: 91	PUBLIC GUARDIAN , was appointed Conservator of Person and Estate on 11/05/08. Order Settling the Second Account filed 01/22/13 set this matter for a status hearing regarding filing of the Third Account. Status Report filed 06/20/14 states: the Public Guardian is still working on its accounting in this matter. It is anticipated that the account and report will be ready to be filed within the next 45 days. Therefore a continuance of 45 days is requested.	NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED FROM 06/24/14</u> <i>As of 08/04/14, nothing further has been filed in this matter.</i> 1. Need Third Account.
DOB: 08/11/22		
Cont. from 032814, 041114, 052314, 062414		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF Reviewed on: 08/04/14 Updates: Recommendation: File 10 – Fly

Atty Prado, Gloria (pro per Petitioner/paternal grandmother)

Atty Prado, Alfonso Duran (pro per Petitioner/paternal step-grandfather)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 13 years		TEMPORARY EXPIRES 7/2/14		NEEDS/PROBLEMS/COMMENTS:	
		GLORIA PRADO , paternal grandmother and ALFONSO PRADO , paternal step-grandfather, are petitioners.		1. Need Notice of Hearing. 2. Need proof of service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice or Declaration of Due Diligence on: a. Abel Hernandez (paternal grandfather) b. Maternal grandparents	
Cont. from 070214		LILLIAN LOPEZ and ANABEL HERNANDEZ , paternal aunts, were appointed guardians on 7/3/08. The Court on its own motion terminated the appointment of Lillian and Anabel per minute order dated 5/15/14. Both former guardians consent and waive notice.			
	Aff.Sub.Wit.				
✓	Verified				
	Inventory				
	PTC				
	Not.Cred.				
	Notice of Hrg	X			
	Aff.Mail	X			
	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.				
✓	Conf. Screen				
✓	Letters				
✓	Duties/Supp				
	Objections				
	Video Receipt				
✓	CI Report				
	9202				
✓	Order				
	Aff. Posting				
	Status Rpt				
✓	UCCJEA				
	Citation				
	FTB Notice				
<p>Father: DECEASED</p> <p>Mother: OFELIA HERNANDEZ – Court found due diligence per minute order dated 5/15/14.</p> <p>Paternal grandfather: Abel Hernandez Maternal grandparents: Unknown</p> <p>Petitioners state guardianship is necessary because the minor does not have any other place to live. They are his grandparents and they love him.</p> <p>Court Investigator Samantha Henson's Report filed on 6/25/14.</p>				<p>Reviewed by: KT</p> <p>Reviewed on: 8/4/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 11 - Hernandez</p>	

Age: 9		LONDELL MAIDEN , father, is petitioner. JOSEPHINE YBARRA and ANGEL YBARRA , maternal grandparents, were appointed guardians on 05/14/2009. Mother: LEA CARMEN YBARRA – <i>Personally served on 06/12/14</i> Paternal Grandparents: UNKNOWN Petitioner requests visitation so that Reyna will know she is loved and wanted and to know her father.	NEEDS/PROBLEMS/COMMENTS: 1. Need <i>Notice of Hearing</i> . 2. Need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Visitation</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: a. Josephine Ybarra (maternal grandmother/guardian) b. Angel Ybarra (maternal grandfather/guardian) c. Paternal grandparents	
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			x
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			w/
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order	x		
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: JF Reviewed on: 08/04/14 Updates: Recommendation: File 12 – Ybarra	

13 Destiana Jaurique, Denicio Jaurique and Alyssa Jaurique (GUARD/P)

Case No. 13CEPR00814

Atty Piombino, Cynthia (pro per – paternal grandmother/Guardian)
 Atty Jaurique, George Danny (pro per – paternal grandfather/Guardian)
 Atty Jaurique, Temujin O (pro per – father/Petitioner)

Petition for Termination of Guardianship

Destiana, 11	TEMUJIN JAURIQUE, father, is Petitioner.		NEEDS/PROBLEMS/COMMENTS: 1. Need <i>Notice of Hearing</i> . 2. Need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Termination of Guardianship</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: a. Lisa Marcelli (mother) b. George Jaurique (paternal grandfather/guardian) c. Cynthia Piombino (paternal grandmother/guardian) d. Don Marcello (maternal grandfather) e. Susan Marcelli (maternal grandmother)
Denicio, 10	GEORGE JAURIQUE and CYNTHIA PIOMBINO , paternal grandparents, were appointed as co-guardians on 11/14/13.		
Alyssa, 9	Mother: LISA MARCELLI		
Cont. from			
<input type="checkbox"/> Aff.Sub.Wit.	Maternal grandfather: DON MARCELLI		
<input checked="" type="checkbox"/> Verified	Maternal grandmother: SUSAN MARCELLI		
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input type="checkbox"/> Notice of Hrg	<input checked="" type="checkbox"/>	Petitioner states that he has completed a substance abuse treatment program, become a responsible person and is ready to have his children back in his care. Court Investigator Julie Negrete filed a report on 07/15/14.	
<input type="checkbox"/> Aff.Mail	<input checked="" type="checkbox"/>		
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen			
<input type="checkbox"/> Letters			
<input type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input checked="" type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
			Reviewed by: JF
			Reviewed on: 08/04/14
			Updates:
			Recommendation:
			File 13 – Juarique

Pro Per Alexander, Joseph (Pro Per Petitioner)
 Pro Per Sellers, Judith (Pro Per Petitioner)

Petition to Determine Succession to Real Property (Prob. C. 13151)

DOD: 4/4/2014		JOSEPH ALEXANDER and JUDITH SELLERS, children, are Petitioners. 40 days since DOD No other proceedings I & A - \$174,000.00	NEEDS/PROBLEMS/COMMENTS: Continued to 9/10/2014 Per Petitioner request 1. <i>Final Inventory and Appraisal</i> filed on 7/16/2014 shows the estate value is \$174,000.00 . Pursuant to Probate Code § 13151, a petition to determine succession is authorized only where the gross value of Decedent's real and personal property does not exceed \$150,000.00 ; the Decedent's property does not meet the exceptions under Probate Code § 13050. Therefore, the instant <i>Petition</i> is not authorized under the Probate Code and must be denied and dismissed.
Cont. from 070214			
	Aff.Sub.Wit.		
✓	Verified		
✓	Inventory		
✓	PTC		
	Not.Cred.		
✓	Notice of Hrg	Will dated 11/30/2012 devises real property on Harvard Ave. in Clovis to JOSEPH R. ALEXANDER , real property on Woodworth Ave. in Clovis to JUDITH M. SELLERS , and residue of estate to JOSEPH R. ALEXANDER and JUDITH M. SELLERS in equal shares. Petitioners request Court determination that Decedent's 100% interest in real property located at 1121 Harvard Ave. in Clovis to JOSEPH R. ALEXANDER , real property on Woodworth Ave. in Clovis to JUDITH M. SELLERS , and Decedent's 100% interest in personal property consisting of automobiles and household furnishings, passes to the Petitioners in equal shares pursuant to Decedent's Will.	
✓	Aff.Mail		W/
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: LEG Reviewed on: 8/5/14 Updates: Recommendation: File 14 - Alexander

Age: 31 years		<p>THERE IS NO TEMPORARY. Temporary was denied.</p> <p>KENYATA LINDSEY-WALTON, sister, is petitioner and requests appointment as conservator of the person with medical consent powers.</p> <p>Medical Declaration: NEED.</p> <p>Petitioner does not state why a conservatorship is necessary.</p> <p>Voting Rights Affected.</p> <p>Court Investigator Jennifer Young's Report filed on 7/16/14.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>MONIQUE FIELDS, aunt, has filed a competing petition. Please see page 8B.</p> <p>Court Investigator Advised Rights on 7/15/14.</p> <p>Voting Rights Affected. Need Minute Order</p> <ol style="list-style-type: none"> 1. Need Capacity Declaration completed by the proposed conservatee's physician if medical consent powers are to be granted. 2. Need proof of personal service of the citation on Maurice Jones – Declaration of Joseph Connelly filed on 7/31/14 states he attempted to serve the proposed conservatee, Maurice Jones, on two separate occasions. Both attempts were unsuccessful. <p>Note: Declaration of Petitioner states she is unable to get the capacity declaration completed because Maurice is not in her care and her aunt [Monique Fields] won't let her take him out.</p>	
Cont. from 072214				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			X
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
✓	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
✓	Citation			
	FTB Notice			
		<p>Reviewed by: KT</p> <p>Reviewed on: 8/4/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 15A – Jones</p>		

Petition to Determine Succession to Real Property (Prob. C. 13151)

DOD: 6-8-13		JASON B. LEE , Son, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		40 days since DOD	1. The petition is missing Attachment 11 containing: 1) the legal description and APN of the real property 2) decedent's interest in the real property
		No other proceedings	
	Aff.Sub.Wit.	I&A: \$65,000.00 (real property located at 4541 E. McKenzie in Fresno)	2. Need revised proposed order containing the legal description of the property and the interest passing to Petitioner at #9.
✓	Verified		
✓	Inventory	Decedent died intestate	<div> Reviewed by: skc Reviewed on: 8-4-14 Updates: Recommendation: File 16 – Burnda </div>
	PTC	Petitioner requests Court confirmation that Decedent's real property passes to him pursuant to intestate succession.	
	Not.Cred.		
N/A	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

17 **Maria Guadalupe Lebres Hernandez and
Cesar Eduardo Lebres Hernandez (GUARD/P)**

Case No. 14CEPR00671

Atty **Reyes, Rosa Cruz (Pro Per – Non-relative – Petitioner)**

Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)

GENERAL HEARING 7-28-14			NEEDS/PROBLEMS/COMMENTS:
ROSA CRUZ REYES , Non-relative, is Petitioner.			
Father: LORENZO LEBRES RODRIGUEZ - Deceased Mother: ZENAIDA HERNANDEZ GARCIA - Deceased			
Paternal Grandfather: Efrain Lebres Arrelaga - Deceased Paternal Grandmother: Elena Rodriguez - Vera Cruz, Mexico			
Maternal Grandfather: Unknown Maternal Grandmother: Unknown			
Petitioner states she was engaged to the minors' father and their wedding was set for October, but he was involved in a car accident and lost his life on 5-19-14. The children have been in Petitioner's care for the past two years and wish to continue in her home. Temporary Guardianship is needed for their educational and medical needs. The mother died in 2011.			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
N/A	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: skc
			Reviewed on: 8-4-14
			Updates:
			Recommendation:
			File 17 – Lebres Hernandez

Petition for Appointment of Temporary Guardianship of the Person

Age: 17		<u>GENERAL HEARING: 10/01/14</u>		NEEDS/PROBLEMS/COMMENTS:	
		VICKY XIONG, sister, is Petitioner.		1. Need Notice of Hearing. 2. Need proof of personal service at least 5 court days before the hearing of Notice of Hearing with a copy of the Petition for Temporary Guardianship <u>or</u> Consent & Waiver of Notice for: a. Anna Xiong (minor)	
		Father: NYIA XIONG – deceased			
		Mother: YANG MEE XIONG – deceased			
Cont. from		Paternal grandparents: NOT LISTED			
	Aff.Sub.Wit.	Maternal grandparents: NOT LISTED			
✓	Verified	Petitioner states that both parents are deceased. The minor is currently living with a cousin who is no longer able to care for her. Petitioner states that she is able to care for Anna now and requests temporary guardianship.			
	Inventory				
	PTC				
	Not.Cred.				
	Notice of Hrg	x			
	Aff.Mail				
	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.	x			
✓	Conf. Screen				
✓	Letters				
✓	Duties/Supp				
	Objections				
	Video Receipt				
	CI Report			Reviewed by: JF Reviewed on: 08/04/14 Updates: Recommendation: File 18 – Xiong	
	9202				
✓	Order				
	Aff. Posting				
	Status Rpt				
✓	UCCJEA				
	Citation				
	FTB Notice				